

### Location:

- ☐ Whenever possible, conduct the meeting in a private place where the conversation is not able to be overheard by others.
- ☐ If you work in a cubicle, you must find a way to work around it. For example, use a conference room or a private corner somewhere.
- ☐ The location should be somewhere where both of you can be comfortable expressing yourselves freely.

### Seating arrangement :

- ☐ Consider the physical placement of tables or desks and chairs.
- ☐ Strive to make sure both parties are comfortable in a private setting, ideally where both of you can take notes on a desk or a table.
- ☐ A business setting is preferable to a public setting such as a coffee shop or walking around the block.

### Time :

- ☐ Logistically, you want to schedule a time with your employee well in advance, preferably during his or her regular duty hours.
- ☐ Consider the appropriate time of day; choose a time based on your knowledge of the employee. Ask yourself:
  - ☐ Is he or she a morning person?
  - ☐ Is this going to ruin his or her day? Is he or she going to want to leave?
  - ☐ Is this someone who needs to have counseling on Friday so he or she can sort things out over the weekend?
  - ☐ Or, is this a person who will feel like you are leaving no opportunity for response for 2 days?
- ☐ Set aside adequate time. Generally a counseling session should take no more than an hour.
- ☐ When scheduling a meeting to discuss a performance issue, make sure you allow adequate time for your comments and any feedback from the employee. If more time is needed, consider scheduling a second session.
- ☐ Check and make sure there are no important events scheduled at the same time that may be distracting.
- ☐ Turn off your mobile devices and use a space where you won't be disturbed by a phone ringing; or have your phone calls redirected.
- ☐ Face-to-face counseling is best. If you have employees who telework, try to schedule counseling sessions when they are in the office but keep the timeliness factor in mind; excessive delay can dilute the process.

### Representative in attendance :

- ☐ Generally speaking no representative needs to be present for this but if in doubt, check with your ER Specialist.